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To: Anne Teresa, FSA

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Subject: Deliverable 129.1.3 - "100 Series" Draft Curriculum

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Deliverable Overview

This deliverable provides a draft of the Training for Financial Aid Professionals (TFAP) curriculum (formerly referred to as the "100 Series") and includes the following sections:

- Curriculum Update
    - Final design update for the TFAP curriculum
    - Revised TFAP curriculum
- Deployment Plan Recommendations
    - Revised approach for packaging materials, including recommended approaches for publicizing and implementing the TFAP curriculum
- Future Curriculum Development
    - Course and resource descriptions (for selected to-be-developed courses).

Background

FSA University develops and delivers training programs for external partners, specifically colleges and universities that participate in the Title IV program. To prepare financial aid administrators (FAAs) to interact with FSA systems and processes, support has been provided to identify and organize a training curriculum and schedule for external partners (i.e. participating schools). This effort involves the creation of a list of courses and materials that provide the foundation of knowledge for both new and existing FAAs.

At present, FAAs are informed of FSA-sponsored training on an as-needed basis by checking one of several information sources. Feedback from the FAAs indicates that they want to be more informed about FSA's training offerings. Specifically, they would like FSA training to:

- Clearly identify the target audience for the training
- Coordinate the learning objectives among the courses to ensure that they complement one another, rather than having gaps or redundancies
- Schedule training further in advance
- Coordinate training with the financial aid calendar.

Subject: Deliverable 129.1.2 - "100 Series" Deployment Plan

During the initial phases of this effort, the project team outlined content recommendations for the TFAP curriculum and drafted a deployment approach for promoting awareness and usage of the new curriculum. This deliverable builds on previous work and includes a description of the final updates to the TFAP curriculum, as well as revised deployment plan recommendations. In addition, the team began drafting learning objectives for selected "to be developed" courses in the curriculum and developed a prototype of the primary deployment vehicle: the FSA website.

Curriculum Update
The "100 Series" was conceived as the first phase of a curriculum that would contain entry-level courses for new FAAs and that would include a future "200" and "300 Series" for intermediate and advanced courses. The scope of the curriculum changed when the project team realized that existing FSA course offerings could not be categorized into a "beginner," "intermediate," and "advanced" structure. Due to this change in scope, the "100 Series" was no longer an accurate description of the contents of the curriculum, and the team decided to re-brand the initiative.

The team outlined some requirements for the new brand and agreed that criteria for the new title must be:
* easily understood by FAAs
* intuitive in its description of the contents of the curriculum
* clear in the description of the target audience
* comprehensive, including both courses and materials, but without a level of experience or function bias in the title (like "100 Series")

Options considered included the "FSA Course Curriculum," "FAA Training" and "Training for Financial Aid Professionals." "FSA Course Curriculum" provided a comprehensive description that included training and materials, but did not clearly define the target audience. "FAA Training" emphasized the target audience by putting "FAA" first in the title, but otherwise was vague. "Training for Financial Aid Professionals" or "TFAP" clearly defined the audience and provided a comprehensive description. In addition, TFAP is consistent with another web resource FSA provides to FAAs: IFAP (Information for Financial Aid Professionals). As a result, the "100 Series" has been re-branded as "Training for Financial Aid Professionals."

All references in previous deliverables to the "100 Series" or "the curriculum" can be assumed to refer to what is now known as "Training for Financial Aid Professionals." The updated curriculum is contained in the attached "Proposed TFAP Curriculum" documents. Also included in the "Stakeholder Feedback" attachment is documented feedback which impacted design changes for the curriculum.

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Deployment Plan Recommendations
The deployment effort continued, and the team's high-level accomplishments (described in detail below) include:
- Developing deployment objectives to outline what the deployment effort should accomplish
- Developing key messages to be used in creating communication materials
- Finalizing recommendations for deployment vehicles
- Beginning development of communication materials including a prototype website, prototype flyer, text for email announcements, and text for TFAP and IFAP web pages.

Detailed information about deployment is documented in the attached "TFAP Deployment Plan." Recommendations summarized below are described in detail in the attached "Draft Delivery Options Matrix."

Deployment Objectives
Deployment objectives are critical for the successful deployment of TFAP, since they provide a decision-making framework for marketing the effort. Objectives include a curriculum that is easily accessible via the web, a clearly defined target audience that includes all FAAs (not just new FAAs), and a deployment strategy that leverages existing FSA vehicles to promote key messages without making a "big splash." Per the suggestion of FSA sponsor Bill Ryan, existing communication channels have been leveraged as much as possible to create awareness of TFAP. Since the website is a new resource for FAAs, but is based on existing materials, it is important to create awareness among FAAs while also managing expectations of what the new resource offers.

Key Messages
The team developed key messages to ensure that consistent information is included in all promotional materials. Considerations in developing key messages focused on clearly defining the target audience and providing the audience with the appropriate information about the new TFAP website. FAAs will be encouraged to visit the TFAP website which contains the latest information on current and future training opportunities, conferences and resources for FAAs.

Recommended Vehicles
The final deployment recommendations listed below provide an optimal mix of vehicles to promote awareness of the new curriculum among FAAs.
- TFAP Website (electronic)
- Email announcements (electronic)
- Listservs (electronic)
- Poster/flyer posted in regional offices, provided to FSA customer service representatives and distributed to schools for posting (paper-based)
- Verbal announcements at Electronic Access Conferences (face-to-face)
- Verbal announcements at training events (face-to-face)

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The primary deployment vehicle will be the TFAP website which will replace the FSA University website. The team developed a prototype of the website, and the prototype is included in the "TFAP Website" attachment. Requirements discussed for the website included that the site must be easy to update, communicates key messages, contains links from IFAP and Schools Portal, and meets deployment objectives. All other vehicles will direct FAAs to use the website. The team continues to develop communication materials and so far has created draft text that includes email/listserv announcements, a draft poster/flyer to be distributed at conferences and events, and talking points for slides that will be used at live events. These materials are included in the "Draft TFAP Deployment Plan."

Future Curriculum Development
FSA is expanding its curriculum for the 2004 training calendar with TBD courses based on results from a needs assessment survey of FAAs. FSA will only publish information on the TFAP website about courses that have signed task orders. The team is developing the high-level learning objectives for two approved new courses on the 2004 training calendar. The Integration Partner is assisting with the development of these courses by providing support for drafting high-level learning objectives, determining subject matter experts for course development, and defining a high-level workplan.

Draft learning objectives were written for the "Nontraditional Programs" and "2004 Spring Training" courses. Learning objectives developed for the "Nontraditional Programs" course will not be used since this course was removed from the curriculum at the request of the General Manager for the Schools Channel. At the writing of this deliverable, a new course, "Getting It Right-Mistakes We've Found and Learned From," was added to the curriculum. This course will use a case-study approach to educate FAAs about audit and program review findings. Learning objectives are currently in review and remain to be finalized in the next phase of this effort.

Development of Learning Objectives
In preparation for the development of learning objectives, the team leveraged the existing FSA Training Process framework. This framework contains a "How to Identify Learning Objectives" job aid, a learning objectives table that contains action words for writing action-oriented learning objectives, and a learning objectives template.

Learning objectives should be focused on outcomes, specific, and measurable. Learning objectives contain three components which include:
• **Performance/Action:** what should the participant be able to do?
• **Environment/Condition:** what will the participant have/not have while performing?
• **Measure/Criterion:** how well must the performance be done?

The team decided to write high level course objectives that address only the performance/actions that should result from the course. Learning objectives written by the team can be found in the "Learning Objectives" attachments.

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Project Management
The Integration Partner is assisting FSA in further developing project management skills and strengthening FSA's capability in meeting management, workplanning, communication planning, and instructional design.

Workplan
To manage the development and deployment of the curriculum, a workplan was created by the project team and is being managed by the team lead. The workplan is a living document that drives the daily activities of the team and is adjusted to accommodate changes in direction. The latest version of the workplan is the attached document "Interim Project Workplan."

Communication Plan
To ensure that all stakeholders are informed of the progress of the TFAP curriculum, the team developed a communication plan. This plan has been reviewed by the team, and is currently being reviewed by the team lead. The latest version of the communication plan is the attached document "Interim Communication Plan."

Subsequent Phases and Next Steps
In subsequent phases, the team will build upon its progress to date through steps that culminate in the deployment of the curriculum to FAAs.
- Next steps include:
  - Publishing the recommended curriculum via the TFAP website
  - Drafting suggestions for the design and development of the TBD course selections
  - Creating a high-level workplan and draft initial timeline recommendations for development of TBD courses
  - Working with SMEs to further define course objectives and create a conceptual description for TBD courses.

Specific products of the next phase will include the *"100 Series" Course Design and Development Plan* which will provide a completed curriculum and course objectives for development/revision of recommended courses.

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Attachments:

Curriculum Update
- Proposed TFAP curriculum
  - Filename: TFAP_Basic_08-15-2003.doc
  - Filename: TFAP_Functional_08-15-2003.doc
  - Filename: TFAP_Conferences_08-15-2003.doc
  - Filename: TFAP_Additional Resources_08-15-2003.doc
- Stakeholder Feedback
  - Filename: TFAP Deployment Plan_Delivery Options_08-15-2003.xls
  - Tab 3 of Excel Book: TFAP Feedback

Deployment Plan Recommendations
- Draft TFAP Deployment Plan
  - Filename: 129.1.3 Deployment Plan_08-15-2003.doc
- Draft Delivery Options Matrix
  - Filename: TFAP Deployment Plan_Delivery Options.xls
  - Tab 1 of Excel Book: Delivery Options
- TFAP Website
  - Filename: TFAP_Web Prototype_1 of 4.pdf
  - Filename: TFAP_Web Prototype_2 of 4.pdf
  - Filename: TFAP_Web Prototype_3 of 4.pdf
  - Filename: TFAP_Web Prototype_4 of 4.pdf

Future Curriculum Development
- Learning Objectives
  - Filename: TFAP_Learning Objectives_Spring 2004_08-15-2003.doc
  - Filename: TFAP_Learning Objectives_Getting It Right_08-15-2003.doc
  - Filename: How to Identify Learning Objectives.doc
  - Filename: Learning Objective Template.doc

Project Management
- Interim Project Workplan
  - Filename: TFAP_Workplan_08-15-2003.xls
- Interim Communication Plan
  - Filename: TFAP_Communication Plan_08-15-2003.doc